

Clerical and Office Branch
General Clerical Group
Tax Series

CUSTOMER ACCOUNTS TAX CLERK III

08/97 (SAC)

Summary

Under general supervision, perform clerical and bookkeeping duties in one or more functions related to the collection, balancing and distribution of tax revenue.

Typical Duties

Provide information to the public regarding property taxes. Involves: addressing complaints by explaining pertinent tax laws and regulations to taxpayers; advising coworkers on changes in law and departmental policies and procedures; reviewing and executing changes to the tax roll; assisting with issuance of annual tax bills; issuing tax certificates and certified tax statements.

Interview taxpayers to secure delinquent tax payment agreements. Involves: preparing payment contracts for Mayor and Council approval; coding accounts which have requested contracts, filed for bankruptcy or filed for tax deferral; reviewing records of delinquent taxes and installment payments; coordinating reminder letters and notices of default to delinquent taxpayers with contract law firm; testifying in court as required.

Perform duties related to cashiering. Involves: reconciling cashier overages and shortages; adjusting or canceling transactions posted by cashiers; posting or verifying payments received through the mail or other collection points; reversing transactions when payment is returned for insufficient funds; posting transactions to ledger or taxpayer file in the computer; preparing bank deposit slips; effecting transfer of funds to entities' bank accounts by preparing deposit slips or wire transfers; notifying entities of amounts deposited; posting receipts and disbursements to ledger; preparing periodic summaries of revenue collected and disbursed.

Perform related duties as required. Involves: Issuing refunds due to taxpayers; computing penalty and interest for non-routine accounts such as those of taxpayers under bankruptcy; researching and analyzing account histories; assisting supervisor to train and develop less experienced personnel by explaining or demonstrating policy and procedure changes, and processing of problem accounts; substituting for coworkers or own supervisor, if assigned, to maintain continuity of operations during temporary absences; maintaining files and prepare reports as required.

Minimum Qualifications

Training and Experience: Graduation from high school or equivalent and four (4) years of experience involving financial or tax record-keeping using automated data processing systems including at least two (2) years customer contact experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Considerable knowledge of office practices and procedures. Good knowledge of: data entry coding systems, bookkeeping principles, methods and practices. Some knowledge of tax laws and regulations, supervisory practices and procedures; bank deposits and account reconciliation.

Ability to: tactfully deal with irate citizens by explaining relevant tax laws and department policies; establish and maintain effective working relationships with fellow employees, officials and the general public; keep financial records and prepare reports.

Skill in: safe operation and care of common office equipment including computer terminals or personal computers; use of spreadsheet, data base and word processing programs; counting money and performing mathematical calculations with speed and accuracy.

Special Requirements: Must be bondable. Must obtain certification from Texas Board of Tax Professional Examiners within the time limits specified by the Texas Property Taxation Professional Certification Act.

Director of Personnel

Department Head